

Agenda Item Form**Agenda Date:** 03/09/04**Districts Affected:** N/A**Dept. Head/Contact Information:** Juan Sandoval, Tax Assessor Collector (541-4598)**Type of Agenda Item:**

- | | | |
|---|---|---|
| <input type="checkbox"/> Resolution | <input type="checkbox"/> Staffing Table Changes | <input type="checkbox"/> Board Appointments |
| <input type="checkbox"/> Tax Installment Agreements | <input type="checkbox"/> Tax Refunds | <input type="checkbox"/> Donations |
| <input type="checkbox"/> RFP/ BID/ Best Value Procurement | <input type="checkbox"/> Budget Transfer | <input type="checkbox"/> Item Placed by Citizen |
| <input type="checkbox"/> Application for Facility Use | <input type="checkbox"/> Bldg. Permits/Inspection | <input checked="" type="checkbox"/> Introduction of Ordinance |
| <input type="checkbox"/> Interlocal Agreements | <input type="checkbox"/> Contract/Lease Agreement | <input type="checkbox"/> Grant Application |
| <input type="checkbox"/> Other _____ | | |

Funding Source:

- ☒ General Fund
- ☐ Grant (duration of funds: _____ Months)
- ☐ Other Source: _____

Legal:

- ☐ Legal Review Required Attorney Assigned (please scroll down): None ☐ Approved ☐ Denied

Timeline Priority: ☒ High ☐ Medium ☐ Low # of days: _____**Why is this item necessary:**

Positions have been approved for reclassification per Civil Service Commission action of 2/26/04 to reflect additional duties and accountability.

Explain Costs, including ongoing maintenance and operating expenditures, or Cost Savings:

Additional cost will be absorbed by the overtime cost savings resulting from the FLSA status change of non-exempt to exempt for the Tax Collection Supervisor position.

Statutory or Citizen Concerns:None**Departmental Concerns:**None.

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CITY CLERK'S OFFICE

Human Resources Department

MEMO

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A-B

To: Civil Service Commission
Thru: Terry Bond, Human Resources Director
James Sienkiewicz, Classification and Compensation Manager *JB*
From: Ana I. Sanchez, Personnel Analyst II *als*
Date: February 17, 2004
Subject: Revision of Job Specifications

Human Resources recommends Commission approval of the job classification items listed below. See attached proposed and strike-through versions of the specifications.

	<u>TITLE</u>	<u>CODE</u>	<u>GRADE</u>
A. OFFICIAL	Tax Customer Accounts Supervisor	1340	GS 19
PROPOSED	Same	Same	GS 22
B. OFFICIAL	Tax Collections Supervisor	1338	GS 22
PROPOSED	Same	Same	GS 25

Revision of the subject job classes was requested by the Tax Assessor Collector. Human Resources found that the responsibilities and duties for these job classes have evolved since the current job classes were written and that they are at variance with positions with comparable minimum requirements that are usually assigned similar duties and functions. Therefore, the above grades for Tax Customer Accounts Supervisor and Tax Collections Supervisor have been proposed to reflect current market conditions and the increase of financial and coordination responsibilities. The Tax Customer Service Supervisor minimum qualifications were modified to increase by one (1) year the included customer service experience to reflect the nature of the additional duties as well as to maintain consistency with the requirements of comparable City jobs.

The attached proposed job specifications summarizing the primary duties, responsibilities, minimum qualifications and other requirements of these job classes were revised using the City's current style and format conventions and have been reviewed by the Human Resources Director and the Tax Assessor Collector. The proposed grade changes shown above are warranted by internal and external equity considerations as well as the increased accountability inherent in the revisions of the affected job classes. Approval of this action will be the basis for the Commission to consider reclassification of the related positions and incumbents listed on the regular agenda for this meeting.

This recommendation is being made pursuant to:

Civil Service Rule 4, Classification, Section 4(a), Reclassification of Positions:

"The Commission or the Human Resources Director may investigate of its own accord or upon the request of a department head, any change in the duties and responsibilities of a position from those upon which it was originally classified. If it is found that the duties and responsibilities of the position have changed so significantly that the former classification is a substantially inaccurate description of the current duties and responsibilities, the Commission will request the Mayor to direct the Human Resources Director to place the position in its proper class and grade."

"A change in compensation applying to all positions of the same class and grade will not affect the seniority or other rights of those in the Civil Service. The Human Resources Director may at any time secure from the appointing authority, department heads or employees involved, statements of the duties and responsibilities of the position under review. The appointing authority, department heads and employees concerned will have an opportunity to be heard before the revised class is approved and to appeal to the Commission in accordance with Article VI, Section 6.13-4 of the Charter."

Attachments

AN ORDINANCE AMENDING ORDINANCE 8064 (THE CLASSIFICATION
AND COMPENSATION PLAN) TO REVISE THE CLASS OF
TAX CUSTOMER ACCOUNTS SUPERVISOR

BE IT ORDAINED BY THE CITY COUNCIL OF THE CITY OF EL PASO:

That Ordinance No. 8064, the Classification and Compensation Plan, shall be amended as follows:

As recommended by the Civil Service Commission, the class of **Tax Customer Accounts Supervisor** is hereby revised in accordance with the duties and responsibilities attached hereto. The Code will remain **1340**. The Grade shall be **GS22**.

PASSED AND APPROVED this 23rd day of March 2004.

THE CITY OF EL PASO

Joe Wardy
Mayor

ATTEST:

Richarda Duffy Momsen
City Clerk

APPROVED AS TO FORM:

Guadalupe Cuellar
Deputy City Attorney

APPROVED AS TO CONTENT:

Terry A. Bond
Human Resources Director

APPROVED BY THE CIVIL
SERVICE COMMISSION:

Date: February 26, 2004

By: Terry A. Bond
Terry A. Bond
Secretary

Clerical and Office Branch
General Clerical Group
Tax Supervisory Series

TAX CUSTOMER ACCOUNTS SUPERVISOR

081/0497 (SAISE)

General Purpose**Summary**

Under general supervision, oversee ~~tax-revenue related customer contact activities~~ ~~tax-revenue related customer contract activities~~.

Typical Duties**Implement**

~~Coordinate activities to reflect changes to the tax rolls made by the Central Appraisal District. Involves: Review operational activities, and develop and implement procedures. Establish work priorities, determine work distribution, and monitor work progress. Update information on current and prior years tax rolls by posting, reviewing and executing changes to the tax roll: changes to add or remove exemptions, compute penalty and interest on taxpayer accounts, change property values, add or delete accounts, update ownership, and prorate accounts from exempt to taxable status or vice versa. Computing penalty and interest on taxpayer accounts and posting changes made; Review and approve levy refunds and check amounts against supplemental batches, acting as liaison with other City departments and outside agencies on matters related to the work of the section; Assisting with distribution/issuance of annual tax bills, and provide corrected statements; Issuing tax certificates and certified tax statements; Advising subordinates on tax regulations and changes in law and departmental policies and procedures updates, procedures. Assist with effective tax rate calculations. Assist in coordination and implementation of yearly effective tax rate publications. Verify wire transfers and respond to audit verifications. Compile and maintain periodic financial reports.~~

~~Respond to unusual or complex inquiries or complaints. Involves: Investigate and resolve customer tax account problems. Provide information to the public regarding the more difficult property tax problems. Involves: addressing complaints by explaining pertinent tax laws and regulations to taxpayers; investigating customer inquiries regarding account balances; notifying customers and appropriate personnel of findings, required adjustments or recommendations; negotiating payment agreements with delinquent taxpayers. Provide accurate information regarding administrative policies and procedures and property tax code and laws to staff, city employees, officials, taxing entities and the public. Assist employees in dealing with hostile or distraught persons. Research and analyze account histories. Negotiate and enforce payments agreements with delinquent taxpayers. Notify appropriate personnel of web site updates as needed.~~

~~Supervise assigned clerical/subordinate staff personnel. Involves: sScheduling, assigning, instructing in, guiding; and check ing and evaluating work; Review operational and procedural activities. Prioritize and coordinate unit activities. Appraise employee performance, arranging for or eEngaging in or arrange for in-employee training and development; eEnforcing personnel rules and regulations, standard of conduct, department policies, and work attendance, and safe work practices/standards regarding attendance, safety practices and conduct; cCounseling, motivateing and maintaining harmonious working relationships among subordinates; Interview applicants. rRecommending hiring, termination, transfers, discipline, merit pay or staffing and other employee status changes; interviewing applicants.~~

~~Perform related duties as required. Involves: Substitute, as qualified, for coworkers or immediate supervisor during temporary absences by performing specifically delegated functions to maintain continuity of operations, as assigned, performing designated duties of coworkers or supervisor, if necessary, to maintain continuity of operations during temporary absences; maintaining files and preparing reports, as required. Participate in special projects as assigned.~~

Minimum Qualifications

~~Training and Experience:~~ Graduation from high school or equivalent and five (5) years of experience involving financial or tax record-keeping using automated data processing systems including at least two (2) years customer contact experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills:

- ~~Considerable knowledge of customer relations, and grievance or conflict resolution techniques.~~
- ~~Considerable knowledge of Texas property tax code and other applicable federal, state and local laws, regulations, rules and ordinances.~~
- ~~Good knowledge of bookkeeping principles, methods and practices. Considerable knowledge of office practices and procedures.~~
- ~~Good knowledge of: account reconciliation and data entry coding systems;~~
- ~~bookkeeping principles, methods and practices; tax laws and regulations; Good knowledge of supervisory supervisory techniques.~~

~~practices and procedures; account reconciliation:~~

- ~~Ability to: establish and maintain effective working relationships with staff, city employees, consultants, officials and the public, including irate people tactfully deal with irate citizens by explaining relevant tax laws and department~~
- ~~Ability to accurately and quickly calculate figures and amounts such as penalties, interest, proportions and percentages.~~
- ~~Ability to analyze, research and maintain taxpayer account records using automated accounting methods to comply with City and Tax Department policies and statutory requirements, and compile data and prepare reports.~~
- ~~Ability to coordinate processing of a high volume of work and meet deadlines.~~
- ~~polices; plan and assign the activities of others; train and develop subordinate employees; Ability to impartially and firmly exercise delegate supervisory authority and enforce established procedures, policies, personnel rules, and regulations;~~
- ~~establish and maintain effective working relationships with fellow employees, officials and the general public; keep financial records and prepare reports.~~

~~Skill in operation and care of personal computer or network station, and generic business productivity software or specialized accounting software. Skill in: safe operation and care of common office equipment including computer terminals or personal computers; use of spreadsheet, data base and word processing software; performing mathematical calculations with speed and accuracy.~~

Other Job Characteristics

- ~~Occasional lifting and carrying of light weight objects (up to 25 pounds).~~

Minimum Qualifications

~~Education and Experience:~~ Equivalent to a high school diploma or General Education Development (GED), plus five (5) years of experience of automated financial or tax record-keeping experience including three (3) years in customer service.

~~Special Requirements:~~

- -Must be bondable.
- -Must obtain certification from Texas Board of Tax Professional Examiners within the time limits specified by the Texas Property Taxation Professional Certification Act.

Human Resources Director of Personnel

Department Head

STRIKE THROUGH

Clerical and Office Branch
General Clerical Group
Tax Supervisory Series

TAX CUSTOMER ACCOUNTS SUPERVISOR

01/04 (AIS)

General Purpose

Under general supervision, oversee tax-revenue related customer contact activities.

Typical Duties

Implement changes to the tax rolls made by the Central Appraisal District. Involves: Review operational activities, and develop and implement procedures. Establish work priorities, determine work distribution, and monitor work progress. Update information on current and prior years tax rolls by posting changes to add or remove exemptions, compute penalty and interest on taxpayer accounts, change property values, add or delete accounts, update ownership, and prorate accounts from exempt to taxable status or vice versa. Review and approve levy refunds and check amounts against supplemental batches. Assist with distribution of annual tax bills and provide corrected statements. Issue tax certificates and certified tax statements. Advise subordinates on tax regulations and departmental policies and procedures updates. Assist with effective tax rate calculations. Assist in coordination and implementation of yearly effective tax rate publications. Verify wire transfers and respond to audit verifications. Compile and maintain periodic financial reports.

Respond to unusual or complex inquiries or complaints. Involves: Investigate and resolve customer tax account problems. Provide accurate information regarding administrative policies and procedures and property tax code and laws to staff, city employees, officials, taxing entities and the public. Assist employees in dealing with hostile or distraught persons. Research and analyze account histories. Negotiate and enforce payments agreements with delinquent taxpayers. Notify appropriate personnel of web site updates as needed.

Supervise assigned subordinate staff. Involves: Schedule, assign, guide and check work. Review operational and procedural activities. Prioritize and coordinate unit activities. Appraise employee performance. Engage in or arrange for employee training and development. Enforce personnel rules and regulations, department policies, and work standards regarding attendance, safety practices and conduct. Counsel, motivate and maintain harmony. Interview applicants. Recommend hiring, termination, transfers, discipline, merit pay or other employee status changes.

Perform related duties as required. Involves: Substitute, as qualified, for coworkers or immediate supervisor during temporary absences by performing specifically delegated functions to maintain continuity of operations, as assigned. Participate in special projects as assigned.

Knowledge, Abilities and Skills

- Considerable knowledge of customer relations, and grievance or conflict resolution techniques.
- Considerable knowledge of Texas property tax code and other applicable federal, state and local laws, regulations, rules and ordinances.
- Good knowledge of bookkeeping principles, methods and practices.
- Good knowledge of account reconciliation and data entry coding systems.
- Good knowledge of supervisory techniques.
- Ability to establish and maintain effective working relationships with staff, city employees, consultants, officials and the public, including irate people.
- Ability to accurately and quickly calculate figures and amounts such as penalties, interest, proportions and percentages.
- Ability to analyze, research and maintain taxpayer account records using automated accounting methods to comply with City and Tax Department policies and statutory requirements, and compile data and prepare reports.
- Ability to coordinate processing of a high volume of work and meet deadlines.
- Ability to impartially and firmly exercise delegate supervisory authority and enforce personnel rules.
- Skill in operation and care of personal computer or network station, and generic business productivity software or specialized accounting software.

Other Job Characteristics

- Occasional lifting and carrying of light weight objects (up to 25 pounds).

Minimum Qualifications

Education and Experience: Equivalent to a high school diploma or General Education Development (GED), plus five (5) years of experience of automated financial or tax record-keeping experience including three (3) years in customer service.

Special Requirements:

- Must be bondable.
- Must obtain certification from Texas Board of Tax Professional Examiners within the time limits specified by the Texas Property Taxation Professional Certification Act.


Human Resources Director


Department Head

OFFICIAL